Estate Planning for Clients With Special Needs Loved Ones

Do you have any clients with disabled children or beneficiaries? If so, they will want to ensure their loved ones have the ongoing financial support to enable them to live as independently as possible without jeopardizing income received from governmental support programs.

Our consumer-facing content addresses the specialized estate planning required to enable your clients to control what happens to their property and possessions if they become incapacitated or die. We cover how your clients can make their wishes clear to avoid family disputes, preserve assets, and provide for loved ones.

This is an important topic that impacts millions of people in the U.S.

- More than 44 million Americans have either physical or cognitive disabilities.
- Among U.S. adults with disabilities, 25% have an unmet healthcare need because of cost.
- More than 7 million disabled people do not live independently.

As their financial advisor, you should have a seat at the estate planning table. Helping your client with special needs children with their estate planning can help contribute to the independence, financial security, and peace of mind of all their children, not just the child with special needs.

Read the Client Guide

Related Value Add Marketing Resources

Specialized Estate Planning presentation

A seminar advisors can give on estate planning tips that ensures their loved ones with special needs are provided the financial support they need.

Download the Presentation >

Specialized Estate Planning Summary

A handout for your clients that covers important tips on supporting loved ones with special needs in a way that creates a rich quality of life led as independently as possible.

Download PDF Handout >

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Share "Strategies to Support Loved Ones with Special Needs" with your clients.

Email Your Clients

Related Resources

- Special Needs Alliance
- Special Needs Answers
- More Value Add Topics

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